

CASELOAD MANAGEMENT REPORT

Caseload management for IVRS field staff includes the utilization of the R-510 printout provided to the field offices monthly. This provides a report of caseload activity and caseload analysis indicators in a statistical format. It enables the reader to know certain processing data for specific counseling assignments, offices and regions, as well as the entire state.

Identifying Data: Each office name, counselor, and reporting period is indicated at the top.

Caseload Data: Caseload figures are taken from the CSR-300~~s~~ submitted. The bottom figure shows the total number of casefiles in each status. The top figure under each status shows the number of casefiles in that status more than the indicated number of months. %~~Total~~+ is the sum of all status entries.

00-06: The total number of cases in these statuses and the percentage of the total caseload they represent are shown.

10-24: The total number of cases in these statuses and the percentage of the total caseload they represent are shown.

S.D.: The bottom figure is the number of SD cases in Status 10 and above in the caseload. The top figure indicates the percentage this number of SD~~s~~ represent of the total 10-24 cases.

Decision Rate: The number of decisions (08~~s~~ and eligibilities) are recorded and divided by the number of months to show the monthly decision rate for each counselor.

Assignments: This shows the number of casefiles which have been newly assigned in 02 to the particular caseload during the course of the report period (RP) as well as the total year to date (TD).

Eligibility: This shows the number of casefiles moved from Status 02 to Status 10 during the report period (RP) and the cumulative under the total year to date (TD).

Closure 08: This shows the number of casefiles moved from 02 to Status 08 during the report period (RP) in the top figure and for the total year to date (TD) in the bottom figure.

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Closure 28: This shows the number of files closed 28 during the report period (RP) in the top figure and for the total year to date (TD) in the bottom figure.

Closure 30: This shows the number of files closed 30 during the report period (RP) in the top figure and for the total year to date (TD) in the bottom figure.

Closure 38: This shows the number of files closed from 04 during the report period (RP) in the top figure and for the total year to date (TD) in the bottom figure.

Closure 26: This shows the number of files closed 26 during the report period (RP) in the top figure and for the total year to date (TD) in the bottom figure.

26 SD: The bottom figure shows the number of 26~~s~~ that were designated SD on a cumulative basis and the top figure shows the percentage this figure represents of the total 26~~s~~.

Closure 331: This shows the number of individuals who have been closed from post-employment services maintaining their previous employment. The top number is the number for the report period (RP) and the bottom number is the total year to date (TD).

Closure 332: This shows the number of individuals who have been closed from post-employment services because the casefile had been reopened. The top number is for the report period (RP) and the bottom number is for the year to date (TD).

Closure 333: This shows the number of individuals who have been closed from post-employment services with an outcome other than 331 or 332. The top number is for the report period (RP) and the bottom number is for the year to date (TD).

Referral Backlog, Acceptance Rate and Rehab Rate will allow the counselor and the supervisor to look at different aspects of caseload management and provide for corrective action where necessary and appropriate. The supervisor will provide consultation as indicated based on the total R-510 data including the following:

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$$\begin{array}{r} \text{Referral Backlog:} \quad 00\cancel{\$} + 02\cancel{\$} \\ \quad \quad \quad 08\cancel{\$} + 10\cancel{\$} \\ \quad \quad \quad \text{No. of months} \end{array}$$

The number of referrals on hand divided by the number of eligibility decisions made per month indicates how long it would take at the current rate of decision making to get all the referrals processed.

$$\begin{array}{r} \text{Acceptance Rate:} \quad \frac{10}{10 + 08} \end{array}$$

This is the rate at which referrals are declared eligible for services. It is a cumulative figure and is a ratio between the number of accepted referrals and the number of all referrals processed, both accepted and rejected.

$$\begin{array}{r} \text{Rehab Rate:} \quad \frac{26}{26 + 28} \end{array}$$

This is the rate at which those clients accepted for services are eventually rehabilitated. It is a ratio between the number of successful closures to date and the total cases which had an IPE developed and implemented.

R-510 A/B Printout

This printout is provided monthly to assist supervisors and counselors in planning their work for the next time period. Client names are listed by status, and by status date chronologically. This allows one to see which clients have been in that status the longest and probably need the most immediate attention.

The IPE monitor dates are provided to show when review dates are due. Those that are overdue are highlighted with an asterisk.

This information is intended to guide the counselor in preparing the R-563 itinerary to include specific client names who should, need or will be seen in the next time period.

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